

Solicitation Number: 06-0001-01
**Solicitation for Defense S&T Reliance Technical,
Programmatic Support Services for Defense Science and
Technology Advisory Group (DSTAG)**

The statement of work, order information, proposal submission requirements, and evaluation information are set forth below. Proposals from holders of ONR Multiple Award Contracts (MATOC) for support services under CLIN 0001 are due by 2:00 PM (local), **October 31, 2005**.

1.0 Background

Defense S&T Reliance is a joint Navy, Army, Air Force, DARPA, Missile Defense Agency (MDA), Defense Threat Reduction Agency (DTRA), and Director of Defense Research and Engineering (DDR&E) Science and Technology (S&T) planning process. The goals of the Defense S&T Reliance planning process are to:

- Enhance the quality of DoD S&T activities and develop world-class products.
- Ensure the existence of critical masses of resources.
- Reduce redundant S&T capabilities and eliminate unwarranted duplication.
- Gain productivity and efficiency through collocation and consolidation of in-house S&T work.
- Preserve the vital, mission-essential capabilities of the components throughout the process.

The Defense S&T Reliance planning process is accomplished and coordinated through the Defense Science and Technology Advisory Group (DSTAG) which is made up of the following members:

- Deputy Under Secretary of Defense (Laboratories and Basic Sciences)
- Deputy Under Secretary of Defense (Science and Technology)
- Deputy Assistant Secretary of the Army (Research and Technology)
- Chief of Naval Research
- Deputy Assistant Secretary of the Air Force (Science, Technology, and Engineering)
- Deputy Director, Defense Advanced Research Projects Agency
- Assistant Deputy Director for Technology, Missile Defense Agency
- Senior S&T Advisor, Defense Threat Reduction Agency
- Deputy Under Secretary of Defense (Advanced Systems and Concepts)
- Deputy Director for Resources and Requirements, Joint Staff (J-8)

The DSTAG Executive Staff (EXSTAFF) is the principal advisor to the DSTAG members in the oversight and operation of the Defense S&T Reliance Process. Each Component and ODDR&E has members assigned to the EXSTAFF.

On an annual basis the Defense S&T Reliance planning process develops and publishes a series of S&T documents to support the President's budget submission. These documents are the Basic Research Plan, the Defense Technology Area Plan, the Joint Warfighting S&T Plan, and a compendium of Defense Technology Objectives.

The incumbent is Strategic Analysis Incorporated; contract number N00014-03-F-0421 competed through GSA.

2.0 Statement of Work

2.1 Objective: Provide support for effective management to the DSTAG and EXSTAFF Programs. The DSTAG and EXSTAFF efforts require management and analytic support in their management of the Defense S&T Reliance planning process.

2.2 Scope: The scope of the work to be performed includes management support for the operation of the Defense S&T Reliance such as the following:

- Providing support to Defense S&T Reliance management (DSTAG and EXSTAFF) in oversight and execution of the Defense S&T Reliance process
- Providing analysis and presentation support to the DSTAG and EXSTAFF and, on a case-by-case basis, other Defense S&T Reliance planning organizations.
- Provide management support for EXSTAFF meetings and to assist the EXSTAFF in administering DSTAG and other Defense S&T Reliance meetings.
- Provide direct support to the Chair of the EXSTAFF.

2.3 Technical Tasks/Requirements

The support includes but is not limited to:

2.3.1 Defense S&T Reliance Technical/Programmatic Support and Analysis: This support will likely include helping to create, promulgate, and facilitate S&T planning guidance, responding to special DSTAG and EXSTAFF initiatives, tracking DoD S&T performance metrics and Technology Readiness Levels, supporting data calls and data integration requirements, and

interfacing with other DoD or Government organizations involved with management or execution of S&T plans. Support may also include providing presentation support, providing meeting room facilities for up to 100 attendees, gathering data, preparing documentation support, and disseminating data. Organizations that may require support include the DSTAG, EXSTAFF, and other management organizations involved with Defense S&T Reliance planning.

2.3.2 EXSTAFF Chair Technical and Programmatic Support: The EXSTAFF Chair position is a two year assignment and is filled on a rotational basis among the three Services. On occasion, the Service EXSTAFF Chair may require additional support specifically to that Services' EXSTAFF Chair duties. Tasks include, but are not limited to:

- Drafting memoranda and e-mails for EXSTAFF Chair signature and release
- Correlating and analyzing information directed to the EXSTAFF Chair from the Defense S&T community
- Preparing briefing material
- Tracking the status of actions required under the Defense S&T Reliance process
- Attending meetings of the EXSTAFF.

2.3.3 Management Support Tasks:

To provide DSTAG & EXSTAFF with Defense S&T Reliance Meeting Support; it is desirable that the contractor be able to provide the following support:

- As needed, the contractor shall develop and prepare the overall program presentation materials and provide administrative assistance during presentations which includes: graphics, copying, audio-visual equipment, obtaining meeting supplies, and obtaining other documentation required by the EXSTAFF or DSTAG Principals.
- As needed, the contractor shall provide conference space to support Defense S&T Reliance activities. The contractor's facility should include a conference room that may be used for the conduct of Defense S&T Reliance meetings either hosted by or supported by the Contractor. Conference space is frequently needed and, on occasion, must be able to accommodate up to 100 participants with capabilities for viewgraph and computer projection presentations. Conference rooms must be equipped with high speed internet ports.

- The contractor will maintain meeting minutes which includes: taking, transcribing, revising, and publishing the meeting minutes.

2.3.4 Technical Support:

To provide DSTAG & EXSTAFF with Defense S&T Reliance Meeting Support; it is desirable that the contractor be able to provide the following support:

- Provide high volume copying capacity for reproduction of Defense S&T Reliance materials. Provide facsimile transmission capability for unclassified documents.
- Provide computer and high speed internet connectivity for electronic transmission of unclassified documents and meeting support.
- Maintain a library of Defense S&T Reliance source documents and CD-ROMs.
- Provide graphics capability for use in the formulation of Defense S&T Reliance materials using desktop publishing software packages. It is desired that the contractor have a high quality equipment at its facility, or available through subcontract, in order to publish professional style handouts, glossies, and other publications.

2.4 **Reports Data and Other Deliverables**

The contractor shall prepare and submit a monthly status report that includes: hours, work completed, tasks accomplished, and support provided. The status report is due no later than fifteenth day of the following month.

3.0 **Personnel Requirements**

3.1 **Personnel Qualifications**

The Contractor shall provide qualified personnel to manage and execute all aspects of the statement of work. The following skill sets are anticipated to support the tasks:

3.1.1 All personnel must be thoroughly familiar and proficient in the use of commercial software packages such as Microsoft Word, Excel and PowerPoint.

3.1.2 Program Analyst III:

For this position, the following qualifications are expected: A Bachelor's degree from an accredited college or university and five years of experience in DoD S&T management. The candidate should have the ability to develop and execute complex technical tasks, to apply analytical problem solving methodologies, to provide technical direction to support staff to interface with Government and prime contractor personnel.

Desired - Demonstrated experience in supporting S&T program management in DoD and knowledge of the Defense S&T Reliance activities, organization, and planning process.

3.1.3 Program Analyst I:

For this position, the following qualifications are expected: At least a Bachelors degree from an accredited college or university - OR - No degree with five years experience in a DoD S&T management. The candidate should have the ability to develop and execute complex technical tasks, to apply analytical problem solving methodologies, to provide technical direction to support staff to interface with Government and prime contractor personnel.

Desired - Demonstrated experience in supporting S&T program management in DoD and knowledge of the Defense S&T Reliance activities, organization, and planning process.

3.1.4 Technical Support Specialist III:

For this position, the following qualifications are expected: At least a Graduate degree in an engineering or other technical field from an accredited university with seven years experience in the analysis of Navy programmatic and operational policies, programs, processes, standards and guidelines concerning S&T. Demonstrated experience in the preparation of technical documentation including program plans and progress reports; preparation and review of policy procedure; and the preparation of new instruction.

Desired - Demonstrated experience in supporting S&T program management in DoD and knowledge of Defense S&T Reliance activities, organization, and planning process.

3.1.5 Technical Support Specialist II:

For this position, the following qualifications are expected: At least a Bachelors degree in engineering or other technical field from an accredited college or university with five years experience - OR - a Graduate degree in a technical field from an accredited university with three years experience in Navy S&T programs. Demonstrated experience in the preparation of technical S&T program planning and progress report documentation.

Desired - Demonstrated experience in supporting S&T program management in DoD and knowledge of Defense S&T Reliance activities, organization, and planning process.

3.2 Level of Effort

3.2.1 The level of effort has been estimated for the proposed contract. Both a one year base period and four one-year options have been defined.

3.2.2 Base Period: The base period of performance will be from time of award through 12-months. The level of effort anticipated for this period is approximately three man-years at an average rate of approximately 500 hours per month. A summary of the labor categories and the total anticipated annual hours for this effort is provided below.

Labor Category	Hours Per Year
Program Analyst III	3000
Program Analyst I	1000
Technical Support Specialist III	1000
Technical Support Specialist II	1000
Total	6000

3.2.3 Option Periods I through IV: If an Option is exercised, the period of performance will be from date of exercise of the option through 12 months. The effort for each option is estimated to be the same as the base period (6000 hr/yr).

3.2.4 The above labor categories and hours are provided as the Government's best estimate of the work to be performed. The offeror may propose the same level of effort (hours and labor categories) or a different level of effort based on its own labor classification system and unique approach to satisfy the Government's requirement. While the Government will consider an alternate level of effort, it is the Government's preference to maximize the estimated labor hours devoted to the direct

performance of the technical tasks. To the extent that the level of effort proposed is different than the Government's estimate, the offeror's technical proposal should clearly specify the hours and labor categories proposed for each task in the statement of work.

4.0 Order Details

4.1 Contract Type: The Navy anticipates awarding a cost plus fixed fee level of effort task order.

4.2 Period of Performance: Base period of 1 year from time of award with four one-year options.

4.3 Other Direct Costs (ODCs)

ODCs (including travel, supplies, etc.) will be reimbursed at cost plus any applicable G&A without profit or fee. Purchases of items (other than consumable materials or supplies) exceeding \$2,500 and all travel must be approved in advance by the Contracting Officer's Representative (COR). The total Travel/ODC amount is not to exceed (NTE) \$13,000 per year. The NTE amount should be proposed and included as part of the cost total (without profit or fee) in every proposal submitted under this solicitation.

4.3.1 Travel and Per Diem - Travel will be required to support this Statement of Work. In accordance with the contract requirements, direct costs associated with the Contractor's travel, including per diem, shall not exceed the applicable rates found in the Federal Travel Regulation (FTR) and/or the Joint Travel Regulations (JTR). All travel arrangements under the Contractor's responsibility include: clearance requests, hotel accommodations, travel orders, and visa/passport requirements, unless otherwise stated by the Government sponsor.

4.3.2 Other Direct Costs (Other than Travel and Per Diem) - ODCs may be required to fully support this task requirement. At this time, the specific items cannot be identified; however, the ODC and Travel cost total cannot exceed the NTE amount stated in Section 4.3.

4.4 Place of Performance: It is anticipated that work will normally be performed at the Contractor's facilities; however, Task 2.3.3 (EXSTAFF Chair Direct Support) may substantially (1200-1500 hours) take place in a government facility.

4.5 Government Furnished Resources (GFR): The Government will provide information, material and forms unique to the Government for supporting the task. The Government furnished resources necessary to perform the statement of work should be identified and requested through the designated Contracting Officer's Representative (COR).

4.5.1 Facilities, Supplies and Services: The facilities required to perform the tasks outlined in the Statement of Work will be at the Contractor's facilities. However, basic facilities such as work space and it's associated operating requirements (i.e., phones, desks, and utilities) will be provided while working in Government facilities. The availability of any required computer resources while working in Government facilities should be verified in advance with the designated Contracting Officer's Representative (COR).

4.5.2 Information: All Government unique information related to this requirement necessary for Contractor performance will be made available to the Contractor. The Contracting Officer's Representative (COR) will be the point of contact for identification of any required information to be supplied by the Government.

4.5.3 Documentation: All existing documentation relevant to this task's accomplishment will be made available to the Contractor at the beginning of the task. The Contractor will be required to prepare documentation in accordance with defined guidelines provided by the Government.

4.5.4 Equipment: With the exception to the basic facility items noted Subsection 4.5.1, and in accordance with the general guidance in FAR Part 45.102, Contractors are required to furnish all property necessary to perform on Government contracts or orders. PC's should not be proposed as a direct charge under this solicitation. For security purposes, computers may be required to be authorized and approved for use by ONR.

ONR currently plans to formally transition to NMCI on or about 01 JUN 2006. During the performance of the Order, if the Government identifies a requirement for the Contractor to obtain an NMCI seat to perform its duties, ONR officials will work with the Contractor to obtain an NMCI seat in a timely manner and, if necessary, will pursue a mutually satisfactory agreement in regards to any formal modifications or changes to the scope, structure or dollar values of the Order as a result of the emerging NMCI requirements. General information regarding NMCI can be obtained at: <http://www.nmci-eds.com/index.asp>.

4.6 Subcontracts/Consultants: Contractor may request or propose, on a case-by-case basis, subcontract/consultant support for specific technical tasks.

4.7 Security Requirements:

a) Clearance Requirements. During the performance of the effort, the Contractor may be required to have access to, and may be required to receive, generate, and store information classified to the level of SECRET. For personnel, a minimum of a SECRET clearance is required. Any Contractor facilities used in support of this contract must be granted SECRET facility clearances and have the capability to store material classified up to and including SECRET. A DD Form 254 will be required prior to access or production of any classified information. Additionally, Contractor is required to safeguard the information labeled as proprietary.

b) Privacy Act. All Contractor personnel assigned to this task will have access to information that may be subject to the Privacy Act of 1974. The Contractor is required to ensure the proper safeguarding of such information to prevent unauthorized release.

c) Nondisclosure Agreement. In the course of its work, the selected Contractor will be required to execute a Nondisclosure Agreements (NDAs) as outlined in Section 5.2.1 of this solicitation.

4.8 Organizational Conflict of Interest

4.8.1 Safeguarding Information

The parties acknowledge that, during performance of the contract resulting from this Order solicitation, the Contractor may require access to certain proprietary and confidential information (whether in its original or derived form) submitted to or produced by the Government. Such information includes, but is not limited to, business practices, proposals, designs, mission or operation concepts, sketches, management policies, cost and operating expense, technical data and trade secrets, proposed Navy budgetary information, and acquisition planning or acquisition actions, obtained either directly or indirectly as a result of the effort performed on behalf of ONR. The Contractor shall take appropriate steps not only to safeguard such information, but also to prevent disclosure of such information to any party other than the Government. The Contractor agrees to indoctrinate company personnel who will have access to or custody of the information concerning the nature of the confidential terms under which the Government received such information and shall stress that the information

shall not be disclosed to any other party or to Contractor personnel who do not need to know the contents thereof for the performance of the contract. Contractor personnel shall also be informed that they shall not engage in any other action, venture, or employment wherein this information will be used for any purpose by any other party.

5.0 Proposal Requirements

5.1 Proposal Format: The Offeror's proposal must be divided into two sections: (1) Technical Proposal, and (2) Cost Proposal. Information for the technical portion shall be a separate and segregable document from the cost proposal. No cost information should be included in the technical section. The length of the technical proposal shall not exceed ten (10) pages, exclusive of resumes. There are no page limits on the number of resumes or the pages of the cost proposal. The proposal should be written and organized to be compatible with the Statement of Work, company's organization and accounting structure, and proposed cost.

(a) Technical Proposal: The technical proposal should include the following: The Offeror's understanding of and approach to the requirement, resumes of proposed personnel, and the amount of proposed hours for personnel. The Offeror should describe specifically how the work activities required to complete the tasks in the statement of work will be done. The Offeror should explain how technical objectives, tasks and deadlines will be determined; how staff responsibilities will be assigned; whether and to what degree consultants and/or subcontractors will be utilized; how the quality and timeliness of work performance will be supervised and controlled; how the Offeror will coordinate with the program office; how a surge capacity will be maintained to meet unanticipated requirements; and how administrative tasks such as travel, security and resource requests will be handled.

The Offeror should include information relative to previous efforts for the same or similar services provided in the past to include contract numbers and Government points of contact where applicable.

The Offeror should explain what corporate facilities are available and would be used in support of the work including computer resources, publication/media materials and equipment where appropriate. The proposal should acknowledge that the Contractor will provide the appropriate IT/telecommunications equipment for the proposed personnel for this task order.

(b) Cost Proposal: The Offeror should submit a cost proposal that itemizes the following proposed costs (as applicable): direct labor (including each

labor category with associated proposed hours and hourly rate), fringe benefits, labor overhead, consultants, subcontracts, subcontractor/consultant handling charges, G&A, cost of money, fixed fee and any other relevant cost categories. The Offeror should also include the estimated Travel and ODC amounts set forth in the "Other Direct Costs" section of the solicitation as part of its proposed costs. The base calculation and rates must be provided for all indirect cost items. Subcontract cost information containing the same type of details described above for the prime must be provided either with the proposal (it can be submitted in sealed envelope) or mailed separately before the solicitation due date and time.

If available and applicable, the Contractor should also provide its Defense Contract Audit Agency (DCAA) point of contact, including the Branch Office name, auditor name, phone number and e-mail address.

5.2 Other Required Documents: Offerors should be aware that, upon receiving an award, the following additional documentation will be required:

5.2.1 Non-Disclosure Agreement. Each employee of the successful Offeror will be required to sign a Non-Disclosure Agreement (NDA) prior to commencing work under this Order. The supervisor/manager of the proposed personnel will also be required to sign the NDA on behalf of the Contractor. Attachment A is the NDA that shall be used at the commencement of this order.

5.3 Proposal Submission: The due date for receipt of proposals for this solicitation is no later than **2:00 pm (Local Time) on October 31, 2005**. All forms of proposal submission must include a signed cover sheet. Proposals must be:

(a) Uploaded electronically via the "[Upload Proposals](#)" hyperlink, which is under the hyperlink for this solicitation on ONR's MATOC website (Note: this site restricts the formats of uploaded documents to those in MS Word, MS Excel, or pdf), or

6.0 Evaluation Information

6.1 Evaluation Criteria: A Task Order will be awarded to the responsible offeror whose offer represents the best value to the Government. In order to determine which offeror represents the best overall value, offers for individual task orders will be evaluated on the following Technical and Price/Cost Factors:

Technical Factors

- (1) Proposed personnel
- (2) Management Plan and Technical Approach
- (3) Past performance on earlier tasks under this and similar contracts
- (4) Corporate Facilities

Price/Cost Factors

- (5) Cost

The Government will make a determination of the overall value of each proposal in terms of its potential to best satisfy the needs of the Government, considering both Technical and Cost Factors.

The Offeror's technical capability (as measured by the Technical Factors) and Cost Factor are equal in importance. In regards to the stated Technical Factors, Technical Factor 1 is of the greatest weight; Technical Factors 2 through 3 are equally weighted. Technical Factor 4 is of less value than all other Technical Factors.

The degree of cost's importance will increase with the degree of equality of the Task Order proposals in relation to the other factors on which selection is to be based, or when the Cost is so significantly high as to diminish the value of the technical superiority to the Government.

In evaluating past performance on individual orders, the procedural requirements in FAR 42.15 are not mandatory. Past performance will be based on the Government's subjective evaluation of the Contractor's performance with previous orders, if any, under this contract and similar contracts.

6.2. Award: The Government will award a task order to the responsible Offeror whose offer conforming to the solicitation will be most advantageous to the Government, cost and other factors considered. The anticipated award date and start date of this Order is on or around **November 16, 2005.**

7.0 Submission of Questions: Any questions regarding this solicitation must be provided in writing to the Point of Contact listed below. Acceptable forms of written question submission include fax and e-mail. Questions submitted less than 72 hours prior to the closing date for proposals may not be answered and the due date for submission of

proposals may not be extended.

8.0 Solicitation Amendments: Any amendments to this solicitation will be posted along with the solicitation on the ONR website. It is the Offeror's responsibility to regularly check for any postings of solicitations, amendments, and questions and answers under this or any other MATOC Solicitation.

9.0 Point of Contact: The Point of Contact for this solicitation is:

Melanie Alston
Contracting Specialist
Phone: 703-696-4257
Fax: 703-696-0066
E-mail: alstonm@onr.navy.mil

Non-Disclosure Agreement Regarding Contractor Support for the Office of Naval Research

The undersigned individual, _____, agrees, both in his personal capacity and as an employee of _____ as follows:

BACKGROUND

1. The mission of the Office of Naval Research is to plan, foster, and encourage scientific research and technology development in recognition of their paramount importance in the maintenance of future naval power and the preservation of national security. ONR provides for the continuing technological superiority of U.S. naval forces, by providing the Department of the Navy (DoN) with mission-relevant, affordable new capabilities that create and exploit scientific breakthroughs, respond to fleet requirements, and support strategic U.S. industries. ONR requires contractor technical services and research support in order to meet these requirements. The services/support that may be provided to ONR by contractor personnel include but are not limited to the following:
 - i. Assist ONR personnel in overall technical program management support on matters and issues consistent with ONR sponsored development projects, including assisting in the evaluation of white papers, proposals, program/project planning, investment reviews, technology assessments, data analyses, conference and seminar activities, and financial issues.
 - ii. Provide support in the financial execution of ONR programs. Monitor availability and use of funds. Review financial documents and plans for impact on program objectives and requirements. Prepare internal financial notices, instructions, guidelines and reports. Conduct analyses and provide reports that identify, quantify and evaluate financial execution of accounts and accomplishment of program goals and milestones. Coordinate preparation and review of actual and projected funding estimates, justifications and strategies. Identify deficiencies, excesses, trends and imbalances to assure funds availability. Work with program personnel to expedite financial execution and ensure programmatic benchmarks are met.
 - iii. Draft analyses, presentations, notes, assessments, testimonies, speeches, and other materials on various technical/management topics, as requested, for use by ONR personnel with other internal ONR departments and externally with the Navy staff, Department of Defense, other federal and state agencies and the U.S. Congress.
 - iv. Provide assistance in the areas of information technology to include database design and maintenance, software development, graphics and reproduction, and other allowable materials and services.
 - v. Provide administrative and management support in the execution of ONR programs to include the preparation of official documents and files for execution by Government employees.
 - vi. Provide support on technical, programmatic and operational matters pertaining to the diverse array of technologies investigated and supported by ONR.

2. The undersigned individual is serving as contractor support for ONR. As such, he has and will continue to come into contact with proprietary technical and commercial information. He likewise will have access to sensitive internal information developed by or on behalf of the Government in connection with the accomplishment of ONR's mission.

AGREEMENT

1. The undersigned individual agrees that he will not disclose to any individual, company, or Government Representative¹ any information² relating to current or proposed Navy budgetary information, acquisition planning or acquisition actions, obtained either directly or indirectly as a result of the effort performed on behalf of ONR. The undersigned individual agrees that he will promptly notify the ONR Office of Counsel of any attempt by an individual (including any contractor personnel), company or Government Representative to gain unauthorized access to such information, and of any disclosure of such information to unauthorized parties. Such notification shall include the name and organization, if available, of the individual, company or Government Representative seeking access to such information.
2. The undersigned and his employer acknowledge that the owner of any proprietary information improperly disclosed stands as an intended third-party beneficiary of this non-disclosure agreement. In the event of an unauthorized disclosure of proprietary information, the owner of the information may seek legal recovery under this non-disclosure agreement, even though the information owner is not a formal party to the agreement.

FOR THESE REASONS the undersigned individual agrees on his own behalf, and his employer likewise concurs, to protect, respect and not disclose the proprietary information and Government mission- and procurement-sensitive information that may come to their attention as part of the contract assistance provided to ONR.

Employee Signature _____

Printed Name _____

Date _____

Concurrence by the employer:

Supervisor/Manager Signature _____

Printed Name _____

Date _____

¹ Government Representative is defined as any Government employee, either military or civilian, not assigned to the activity or program office for which the effort is being performed.

² This information includes, but is not limited to, contractor proposals, proprietary data and commercial information, reports and other information in the Government's possession, including information contained in contracts/grants/agreements and associated records and files